



Medical Records Working Group (MRWG) Meeting Summary October 4, 2007

The Medical Records Working Group (MRWG) met on October 4, 2007 to update and finalize the draft medical and dental records matrix.

Ms. Vani Lancaster, Booz Allen Hamilton support to P&R IM, welcomed participants, facilitated introductions and reviewed the meeting agenda. She reviewed the goal of the meeting to finalize the draft matrix with all of the information/forms that goes into the Member's Service Treatment Record (STR).

Draft Medical and Dental Records Matrix

Ms. Lancaster led the participants through the draft matrix and showed where previous updates had been made, and what remained to be accomplished. She discussed the draft matrix and updated the matrix based on the feedback from all Services' representatives.

Mr. Bobby Hite questioned if a Service does not use a specific form, or the same form as the other Services use, does that Service have an alternative form it routinely uses. Ms. Lancaster informed about a substitute form being listed wherever an alternate form is used instead of a Defense Department (DD) or Standard Form (SF). Mr. Hite agreed and indicated as being mostly concerned about the forms that are checked as having Department of Veterans' Affairs (DVA) use. Per Ms. Lancaster, only copies of discharge summaries related to the inpatient records and forms/electronic equivalents related to outpatient care were included. Otherwise, the cell on the matrix that did not meet the requirement is left blank.

Ms. Debi Yowell shared her review of the Department of Defense (DoD) website with the group. Ms. Yowell indicated she would provide the group with a list of forms cancelled, or obsolete based on her review. Mr. Hite requested that a reconciliation of all forms be done to ensure that all forms listed on the matrix are still in existence. Ms. Lancaster stated that a cancelled or obsolete form prevents the Services from using the canceled or obsolete form on a point forward basis. She added that the forms previously used will remain in the Service members' records. She recommended the list be comprehensive with notations to indicate the cancelled and obsolete forms. Mr. Hite followed up with a request related to the Department of Defense Instruction (DoDI) being developed. He suggested the Proponent/Program Office(s) sponsoring the medical and dental records-related forms that are currently designated as obsolete or cancelled also be involved in the discussion and review of the DoDI.

Upon completion of the review and update of the draft matrix, Ms. Lancaster requested input and validation of all cells highlighted in amber. Updated spreadsheets from the Services are to be sent back to Ms. Retta Graham-Hall via email.

Closing Remarks

Ms. Lancaster thanked everyone for attending the meeting and let them know that their updates were required by Wednesday, October 17, 2007.

Next Meeting: CONFIRMED

Date: August 25, 2007

Time: 0830 – 1630

Location: P&R IM
3rd Floor Main Conference Room
4040 Fairfax Drive
Arlington, Virginia

**Open Action Items To Date:**

| | Responsible Party | Date Opened | Action | Due Date | Status/Resolution | Date Closed |
|----|--|---------------|---|------------------------------|-------------------|-------------|
| 6 | MRWG Co-chairs | June 21, 2007 | a) How are Guard and Reserve HTRs maintained during mobilization and when the Member is on Active Duty? b) How are the Reserve and Guard HTRs transferred to the VA when activated Members apply for benefits? | September 20, 2007 | | |
| 7 | MRWG Co-chairs, Bill Wilson, VBA (C&P) | June 21, 2007 | Recommended changes to the VA Benefits Manual a) 'Clinical records' as noted will include 'copy of the Discharge Summaries from inpatient hospitalization' to further include outpatient treatment record will also include TRICARE referral treatment reports b) Casualty Reports – Define what type of report, line of duty determination and investigation details | TBD (when manual is updated) | | |
| 10 | COL Mason, HRC, Alexandria | June 21, 2007 | Provide policy on saving all military records including email with respect to a military Member | September 20, 2007 | | |
| 12 | Susan Wood, HRC, St. Louis | June 21, 2007 | Engage Office of the Surgeon General (OTSG) Army to update Cadet HTRs disposition in AR 40-66 | September 20, 2007 | | |



| | Responsible Party | Date Opened | Action | Due Date | Status/ Resolution | Date Closed |
|----|---|--------------------|---|-------------------|--------------------|-------------|
| 16 | Coast Guard | June 21, 2007 | Validate all medical and dental forms documentation related to the military Health Treatment Record (HTR) and provide the form number and description related to physical profile documentation | September 6, 2007 | | |
| 19 | Bill Wilson, VBA (C&P) | June 21, 2007 | Confirm the need for DD Form 2697/SF78 – Report of Medical Assessment (Separation Physical Examination) by the VA | September 6, 2007 | | |
| 28 | P&R IM | September 20, 2007 | Include mental health records on the next MRWG agenda | TBD | | |
| 29 | Debi Yowell, Chief Cox, Terry Foley, Rebecca Vinlove, Ciel Lazo | October 4, 2007 | Update the draft medical and dental records matrix for the 'amber' cells and provide to Retta Graham-Hall | October 17, 2007 | | |
| 30 | Vani Lancaster | October 4, 2007 | Review all forms to track if they are obsolete or cancelled | October 17, 2007 | | |

Closed Action Items To Date:

| | Responsible Party | Date Opened | Action | Due Date | Status/ Resolution | Date Closed |
|---|-------------------|--------------|--|--------------|--|---------------|
| 1 | MRWG Members | May 15, 2007 | Validate member representation in the working group | ASAP | Status: Complete Resolution: Membership and mailing list has been updated | June 26, 2007 |
| 2 | MRWG Co-chairs | May 15, 2007 | Establish meeting date for June 2007 | ASAP | Status: Complete Resolution: Date established | June 21, 2007 |
| 3 | P&R IM | May 15, 2007 | Send background documents, meeting minutes and meeting details for the next working group meeting to members | May 24, 2007 | Status: Complete Resolution: Relevant materials were emailed to the group | June 26, 2007 |
| 4 | MRWG Co-chairs | May 15, 2007 | Add Coast Guard to membership lists | May 15, 2007 | Status: Complete Resolution: Coast Guard has been added to the list | June 26, 2007 |



| | Responsible Party | Date Opened | Action | Due Date | Status/ Resolution | Date Closed |
|----|---|------------------|---|--------------------|--|--------------------|
| 5 | MRWG Co-chairs | June 21, 2007 | Include National Guard and Reserve Representation at the MRWG | ASAP | Status: Complete Resolution: A meeting was convened and completed on August 14, 2007 | August 14, 2007 |
| 8 | MRWG Co-chairs | June 21, 2007 | VBA accessing electronic DD Form 214 via DPRIS to support benefits processing | June 25, 2007 | Status: Complete Resolution: Co-chairs discussed this and VA is to receive electronic DD 214 information through the Joint DoD VA initiatives | August 28, 2007 |
| 9 | MRWG Co-chairs | June 21, 2007 | Share information on DoD Task Force on Mental Health | June 25, 2007 | Status: Complete Resolution: Co-chairs were provided with the DoD Mental Health Task Force report | August 28, 2007 |
| 11 | Susan Wood, HRC, St. Louis, COL Mason, HRC, Alexandria, Pat Prieb, VA RMC | June 21, 2007 | Discuss Resolution related to Army Individual Ready Reserve (IRR) HTRs to be received by VA RMC | August 23, 2007 | Status: Complete Resolution: Pat Prieb agreed to receive Army IRR HTRs at VA RMC, St. Louis | August 28, 2007 |
| 13 | Terry Foley, OTSG (Army) | June 21, 2007 | Provide DoD 6015.1-M Glossary of Healthcare Terminology | June 29, 2007 | Status: Complete Resolution: Received hard copy of DoD 6015.1-M on June 25, 2007 | June 26, 2006 |
| 14 | Ciel Lazo, BUMED | June 21, 2007 | Correction to MANMED on Clinical Record to say SF 502 – Discharge Summary only and not the entire clinical record and provide applicable additional BUMED Notes | June 29, 2007 | Status: Complete Resolution: Received the information from Ciel Lazo via email | June 26, 2007 |



| | Responsible Party | Date Opened | Action | Due Date | Status/ Resolution | Date Closed |
|----|---------------------------------------|---------------|--|-------------------|--|-------------------|
| 15 | P&R IM | June 21, 2007 | Retain over arching term 'health record' to include all records, both inpatient and outpatient, medical and dental care, for all Services and reflect this in the enclosure of the DoD Directive along with a matrix of medical records terms along with the updated definitions and disposition destination | June 29, 2007 | Status: Complete Resolution: Retained term and will be incorporated in the glossary | June 26, 2007 |
| 17 | Army – Dental | June 21, 2007 | Validate all dental forms input related to the military Health Treatment Record (HTR) | June 29, 2007 | Status: Complete Resolution: OTSG provided the information | August 28, 2007 |
| 18 | Ciel Lazo, BUMED | June 21, 2007 | Clarification on SF 517/OF 517, PEB report form, and other forms used to document physical profile within Navy and Marine Corps | September 6, 2007 | Status: Complete Resolution: Ciel Lazo provided the information | September 6, 2007 |
| 20 | Debi Yowell, OTSG (Air Force) | June 21, 2007 | Provide the form used to document PEB report in the HTR | September 6, 2007 | Status: Complete Resolution: Debi Yowell provided the information | August 28, 2007 |
| 21 | Air Force – Dental | June 21, 2007 | Confirm use of SF 509, and SF 517/OF 517 within Air Force | September 6, 2007 | Status: Complete Resolution: Debi Yowell provided the information | August 28, 2007 |
| 22 | Terry Foley, Denise Brown OTSG (Army) | June 21, 2007 | Provide a list of additional Army forms that are not noted on the forms spreadsheet | June 29, 2007 | Status: Complete Resolution: Terry Foley provided the information | August 28, 2007 |
| 23 | P&R IM | June 21, 2007 | Update the Medical and Dental Forms Analysis spreadsheet per input from Services | June 29, 2007 | Status: Complete Resolution: Updates performed | August 28, 2007 |



| | Responsible Party | Date Opened | Action | Due Date | Status/ Resolution | Date Closed |
|----|-------------------|-----------------|---|--------------------|--|--------------------|
| 24 | All MRWG Members | June 21, 2007 | Brief respective chain of commands regarding the use of the term 'Service Treatment Record (STR)' instead of military HTR | August 23, 2007 | Status: Complete Resolution: Briefed chain of commands as discussed at August 23, 2007 | August 28, 2007 |
| 25 | MRWG Members | August 23, 2007 | Vote on STR or Service HTR | August 30, 2007 | Status: Complete Resolution: Members voted on both terms. STR received more votes than Service HTR. | August 30, 2007 |
| 26 | MRWG Members | August 23, 2007 | Confirm forms for all Components including the Reserve & Guard | September 6, 2007 | Status: Ongoing Resolution: Updates being performed | October 4, 2007 |
| 27 | MRWG Members | August 23, 2007 | Review Instruction Questions and provide feedback | September 14, 2007 | Status: Complete Resolution: Members provided partial information. | September 19, 2007 |